



2016 Spending Affordability Committee

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Howard County DPZ

2016 Spending Affordability

- **Changing Demographics**
(Increasing Diversity & Aging Population)
- **Land Use**
(Historical & Planning for the Future)
- **Current Development**
(Residential & Commercial)

Population Growth & Increasing Diversity



Population by Race, 2000 & 2010

Howard County Population by Race -- 2000 to 2010

	2000		2010		Growth	
Population of One Race Alone (Non-Hispanic)	235,591	95.1%	261,585	91.1%	25,994	11.0%
White (Non-Hispanic)	180,010	72.6%	169,972	59.2%	(10,038)	-5.6%
African American (Non-Hispanic)	35,353	14.3%	49,150	17.1%	13,797	39.0%
Amer. Ind. & Alaska Native (Non-Hispanic)	515	0.2%	511	0.2%	(4)	-0.8%
Asian & Pacific Islander (Non-Hispanic)	19,057	7.7%	41,206	14.4%	22,149	116.2%
Some Other Race (Non-Hispanic)	656	0.3%	746	0.3%	90	13.7%
Population of Two or More Races (Non-Hispanic) (1)	4,761	1.9%	8,771	3.1%	4,010	84.2%
TOTAL NON-HISPANIC POPULATION	240,352	97.0%	270,356	94.2%	30,004	12.5%
TOTAL HISPANIC POPULATION (2)	7,490	3.0%	16,729	5.8%	9,239	123.4%
GRAND TOTAL POPULATION	247,842	100.0%	287,085	100.0%	39,243	16%

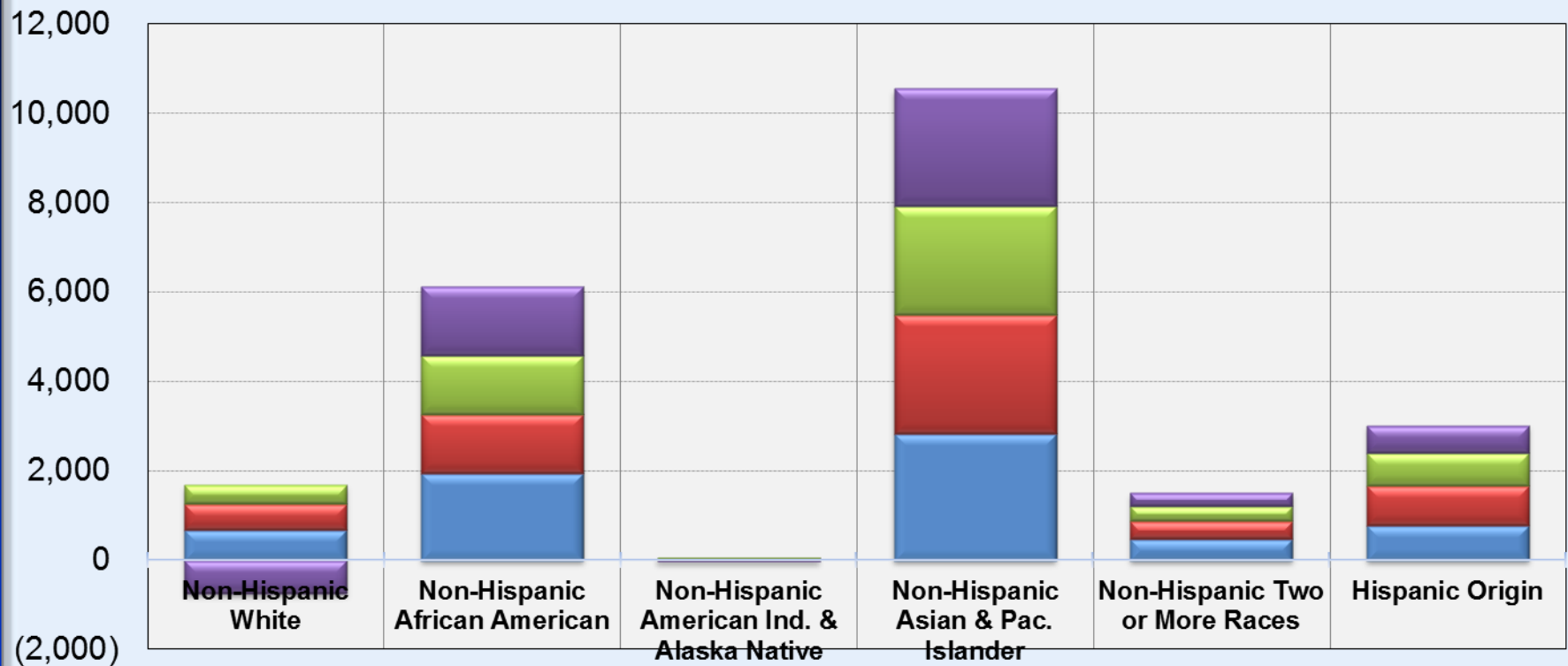
(1) This option was available for the first time in the 2000 Census.

(2) Hispanic Origin can be from any race.

Source: U.S. Census Bureau

Population in 2014 estimated at 309,244
22,159 more than in 2010 (7.7% increase)

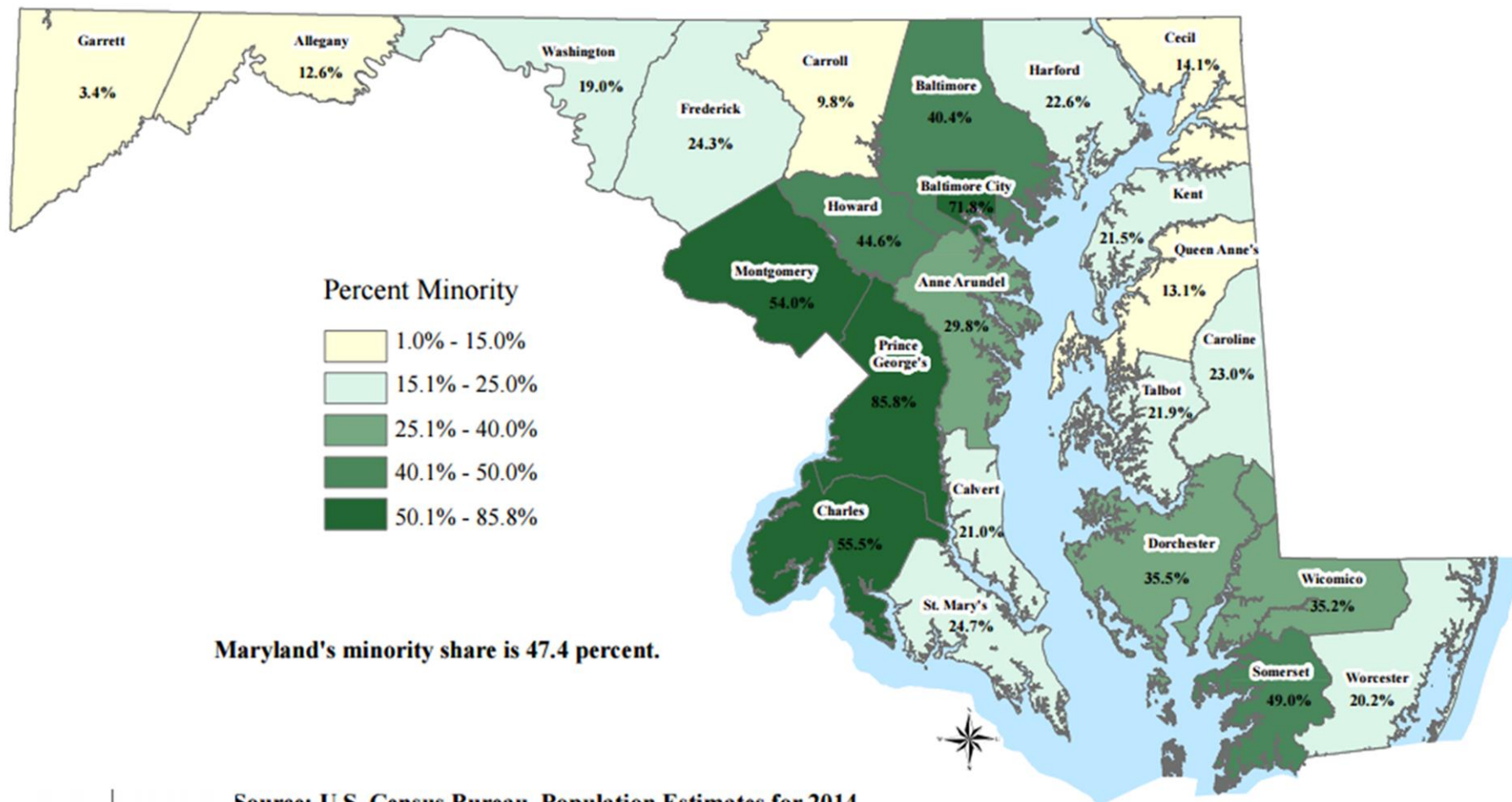
April 2010 to July 2014 Population Increase by Race in Howard County



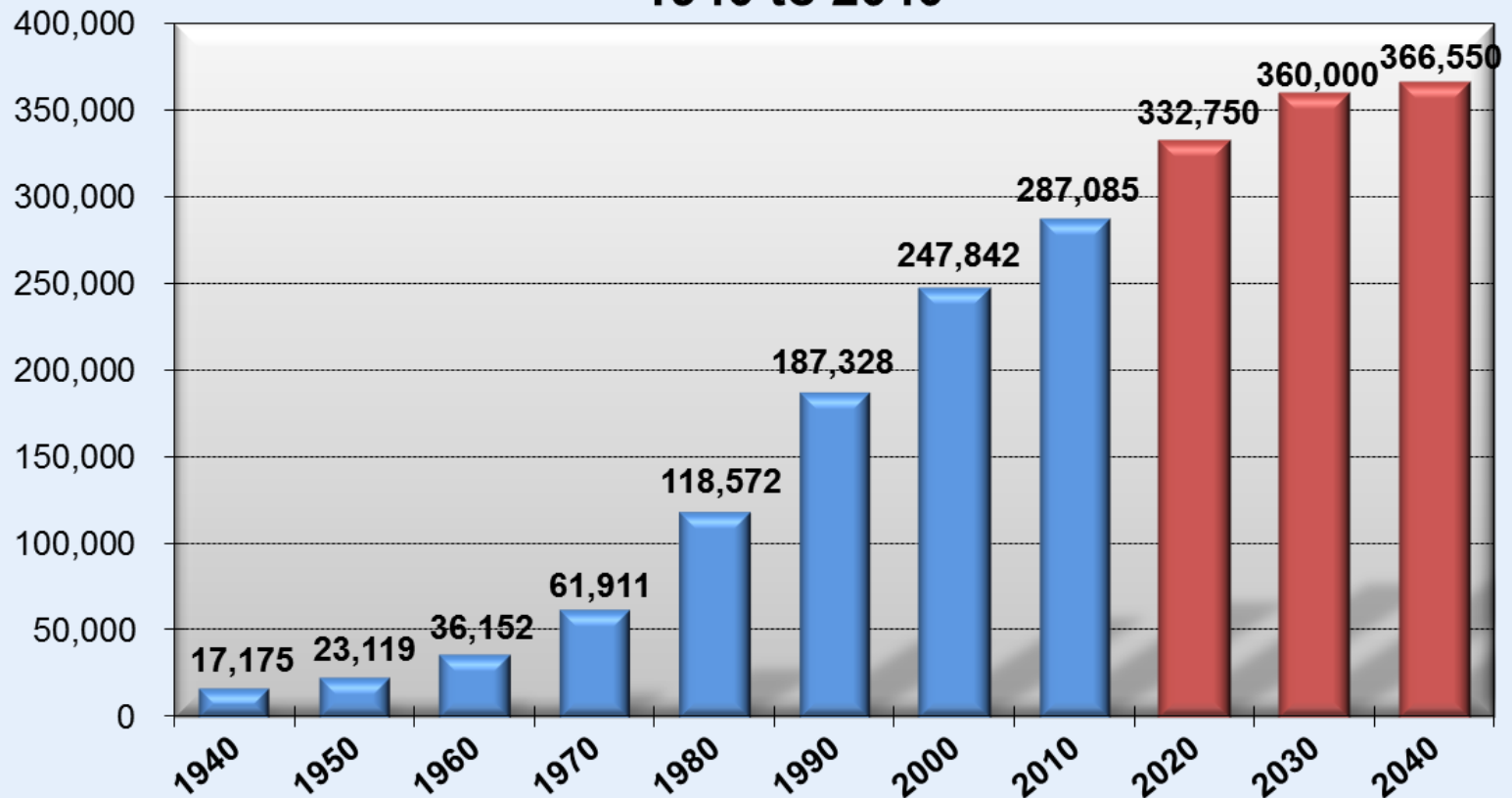
Source: US Census Bureau

■ 2010 to 2011 ■ 2011 to 2012 ■ 2012 to 2013 ■ 2013 to 2014

Minority Population Share for Maryland's Jurisdictions - 2014



Howard County Population Growth 1940 to 2040



Source: US Census Bureau, DPZ (Round 8B)

An Aging Population



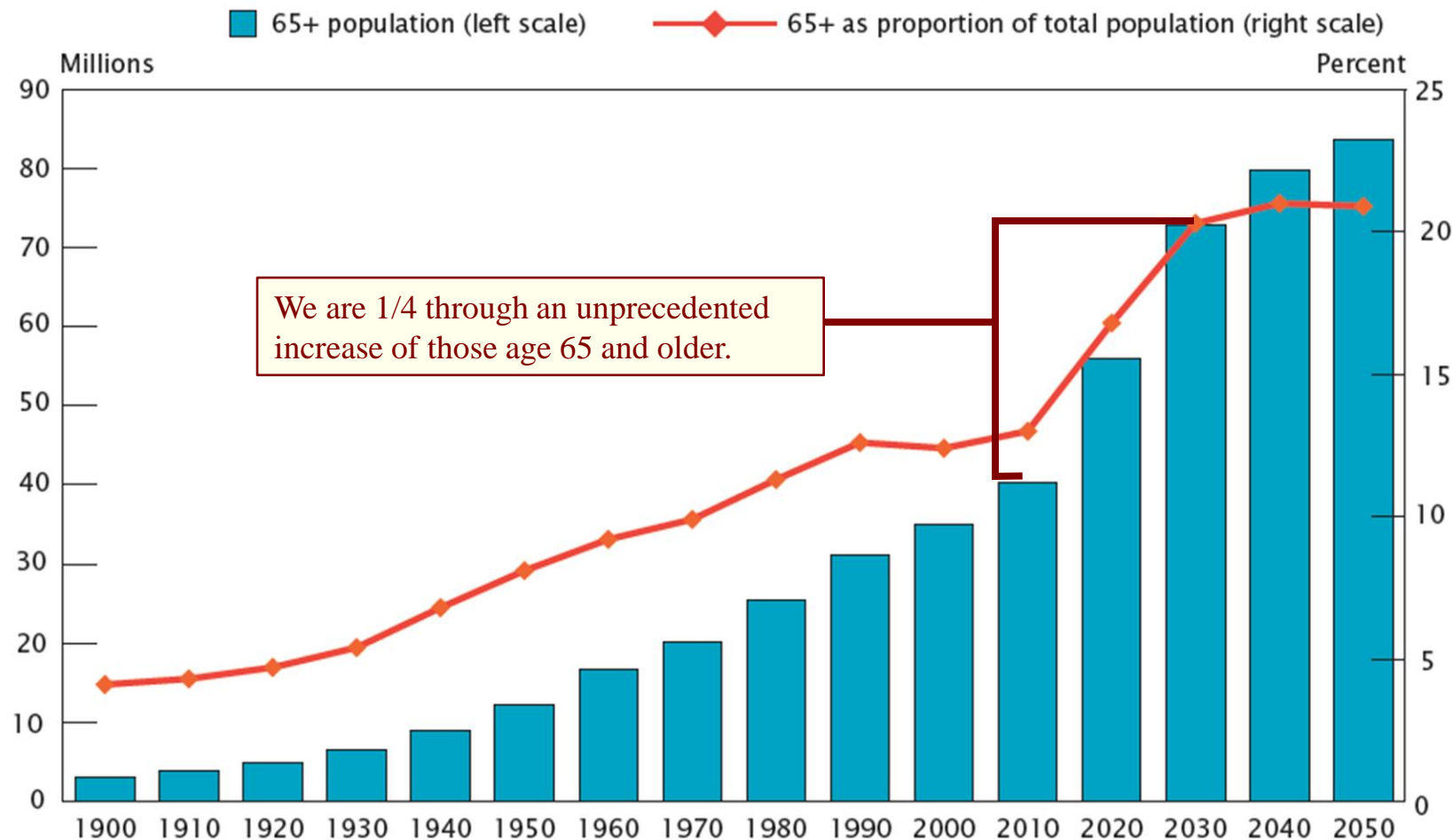
Findings: An Aging Nation

- Older population is projected to nearly double, growing from 43 Million in 2012 to 84 Million in 2050.
- By 2030, one in five Americans will be 65 years or older.
- Growth in the older population will be driven by the aging of the baby boomers over the next two decades.

Figure 1-1.

Population Aged 65 and Over: 1900 to 2050

(For information on confidentiality protection, nonsampling error, and definitions, see www.census.gov/prod/cen2010/doc/sf1.pdf)

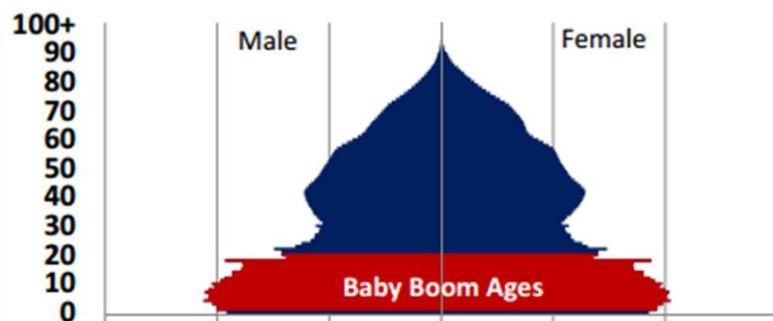


Sources: 1900 to 1940, and 1960 to 1980, U.S. Bureau of the Census, 1983; 1950, U.S. Bureau of the Census, 1953; 1990, U.S. Bureau of the Census, 1992; 2000, U.S. Census Bureau, 2001; 2010, U.S. Census Bureau, 2011; 2020 to 2050, U.S. Census Bureau, 2012a; 1900 to 2010, decennial census; 2020 to 2050, 2012 *National Population Projections*, Middle series.

Population by Age and Sex: 1965 to 2060

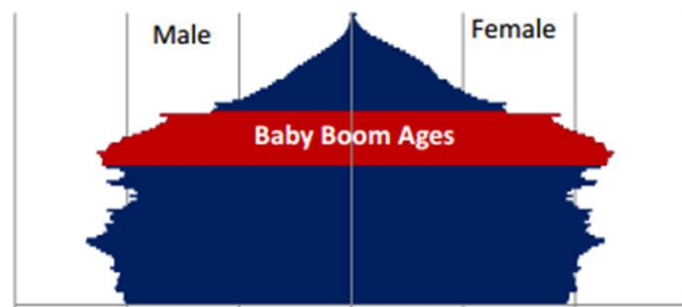
1965

73 million in baby boom ages
(37% of the total population)



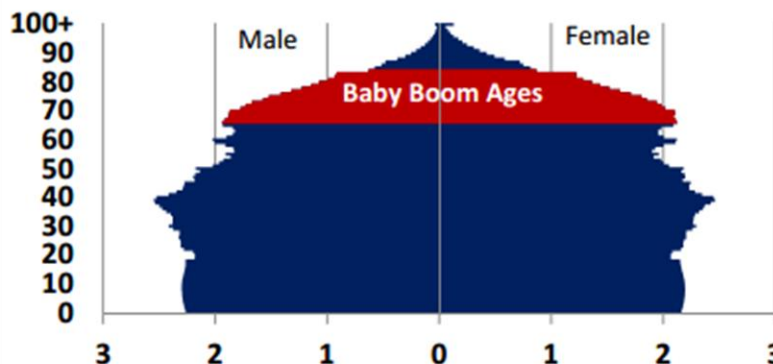
2012

76 million in baby boom ages
(24% of the total population)



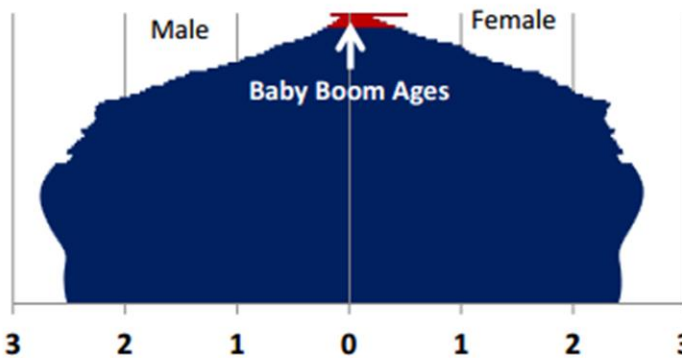
2030

60 million in baby boom ages
(17% of the total population)



2060

2 million in baby boom ages
(0.6% of the total population)



Millions

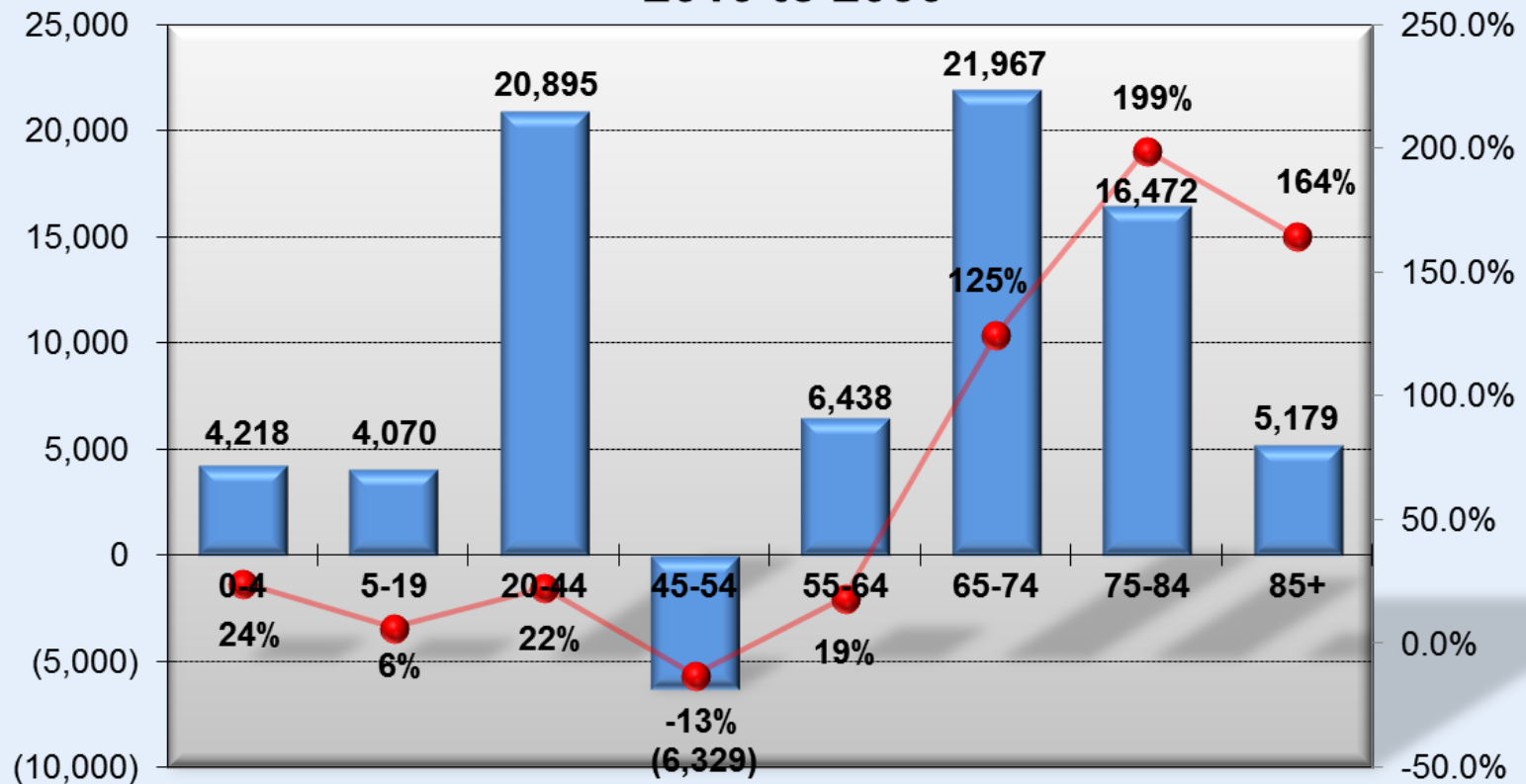
Population by Age, 1970 to 2030

Howard County Population by Age, 1970-2030

Age	1970	1980	1990	2000	2010	2020	2030
0-4	5,702	8,224	15,352	18,248	17,363	19,768	21,581
5-19	19,961	31,791	37,275	55,837	63,360	65,664	67,430
20-44	21,894	52,064	88,243	96,212	92,961	106,471	113,856
45-64	11,027	20,412	35,128	59,077	84,356	90,752	84,465
65+	3,327	6,081	11,330	18,468	29,045	50,094	72,663
TOTAL	61,911	118,572	187,328	247,842	287,085	332,749	359,995
0-4	9.2%	6.9%	8.2%	7.4%	6.0%	5.9%	6.0%
5-19	32.2%	26.8%	19.9%	22.5%	22.1%	19.7%	18.7%
20-44	35.4%	43.9%	47.1%	38.8%	32.4%	32.0%	31.6%
45-64	17.8%	17.2%	18.8%	23.8%	29.4%	27.3%	23.5%
65+	5.4%	5.1%	6.0%	7.5%	10.1%	15.1%	20.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: U.S. Census Bureau, Projections from MDP based on Round 8B

Howard County Population Growth 2010 to 2030



Source: U.S. Census Bureau, Projections from
MDP cohort model based on Round 8B

Population Growth Percent Growth

Sept. 30 School Enrollments

Year	Elementary	Middle	High	Spec. Ed	Total	Change	% Change
1973	10,481	5,289	6,177	30	21,977		
1974	10,798	5,652	6,638	35	23,123	1,146	5.2%
1975	10,891	6,025	7,032	44	23,992	869	3.8%
1976	11,069	6,117	7,410	61	24,657	665	2.8%
1977	11,246	6,175	7,957	62	25,440	783	3.2%
1978	10,968	6,080	8,488	70	25,606	166	0.7%
1979	10,627	6,163	8,530	80	25,400	(206)	-0.8%
1980	10,261	6,337	8,547	83	25,228	(172)	-0.7%
1981	9,856	6,409	8,468	112	24,845	(383)	-1.5%
1982	9,486	6,245	8,387	106	24,224	(621)	-2.5%
1983	9,414	5,988	8,458	103	23,963	(261)	-1.1%
1984	9,808	5,597	8,723	124	24,252	289	1.2%
1985	10,439	5,496	8,900	143	24,978	726	3.0%
1986	11,135	5,551	8,737	173	25,596	618	2.5%
1987	12,155	5,727	8,675	191	26,748	1,152	4.5%
1988	13,225	5,776	8,441	147	27,589	841	3.1%
1989	14,160	6,235	8,305	136	28,836	1,247	4.5%
1990	15,001	6,603	8,248	150	30,002	1,166	4.0%
1991	15,805	7,058	8,527	70	31,460	1,458	4.9%
1992	16,456	7,382	8,858	60	32,756	1,296	4.1%
1993	17,155	7,958	9,107	58	34,278	1,522	4.6%
1994	17,767	8,510	9,611	62	35,950	1,672	4.9%
1995	18,226	8,843	10,181	73	37,323	1,373	3.8%
1996	18,795	9,066	10,713	82	38,656	1,333	3.6%
1997	19,241	9,293	11,387	89	40,010	1,354	3.5%
1998	19,849	9,669	12,020	95	41,633	1,623	4.1%
1999	20,395	10,177	12,481	103	43,156	1,523	3.7%
2000	20,821	10,672	12,927	105	44,525	1,369	3.2%
2001	21,000	11,138	13,479	115	45,732	1,207	2.7%
2002	21,012	11,446	14,080	112	46,650	918	2.0%
2003	20,792	11,689	14,629	101	47,211	561	1.2%
2004	20,498	11,754	15,235	95	47,582	371	0.8%
2005	20,412	11,716	15,580	87	47,795	213	0.4%
2006	20,318	11,889	15,858	90	48,155	360	0.8%
2007	20,550	11,740	16,094	96	48,480	325	0.7%
2008	20,811	11,748	16,231	98	48,888	408	0.8%
2009	21,292	11,649	16,657	85	49,683	795	1.6%
2010	21,814	11,472	16,614	91	49,991	308	0.6%
2011	22,246	11,523	16,627	93	50,489	498	1.0%
2012	22,735	11,483	16,660	91	50,969	480	1.0%
2013	23,327	11,890	16,378	86	51,681	712	1.4%
2014	23,698	12,276	16,438	99	52,511	830	1.6%
2015	24,245	12,689	16,600	103	53,637	1,126	2.1%

Recently Released



Planning for the Growth of the Older Adult Population in Howard County

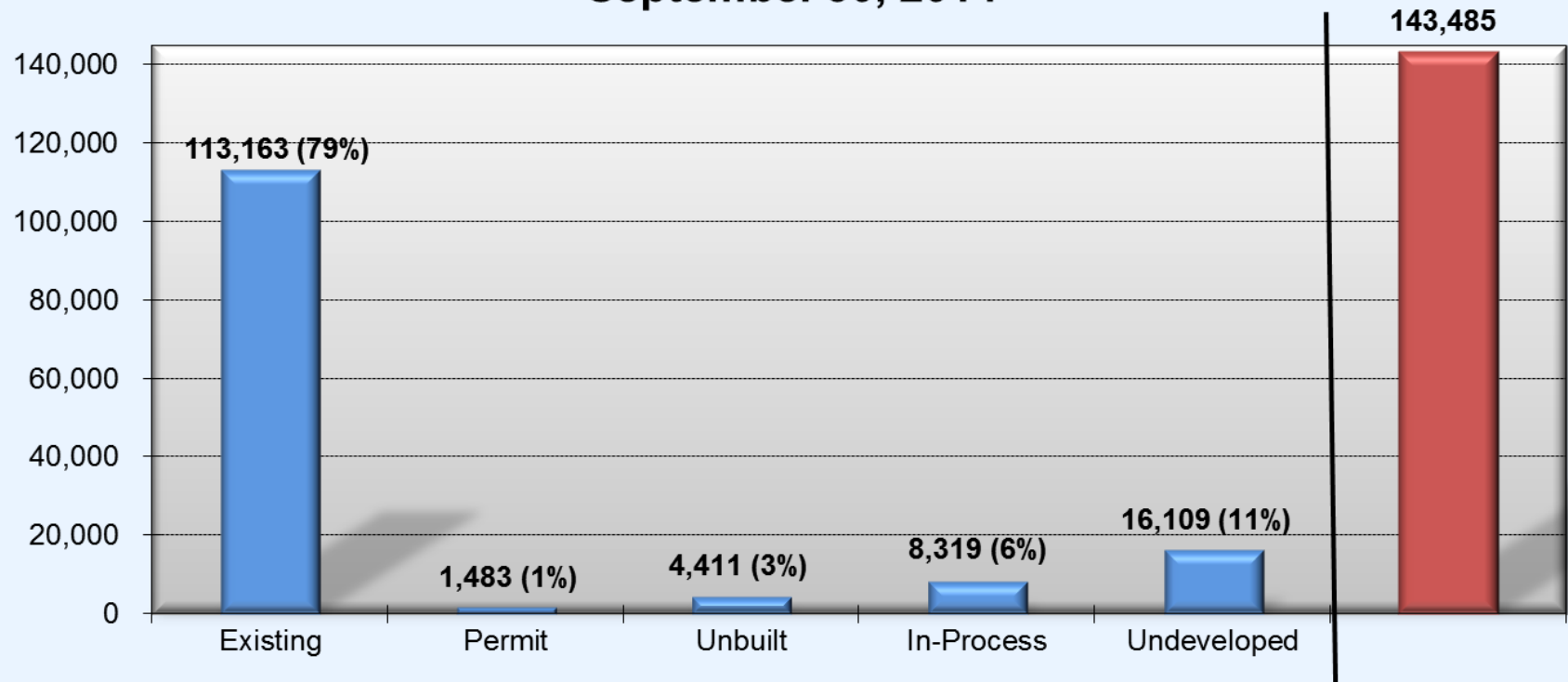
Creating an Age-Friendly Community

A Report from the Howard County
Department of Citizen Services
2015

Evolving Land Use Patterns

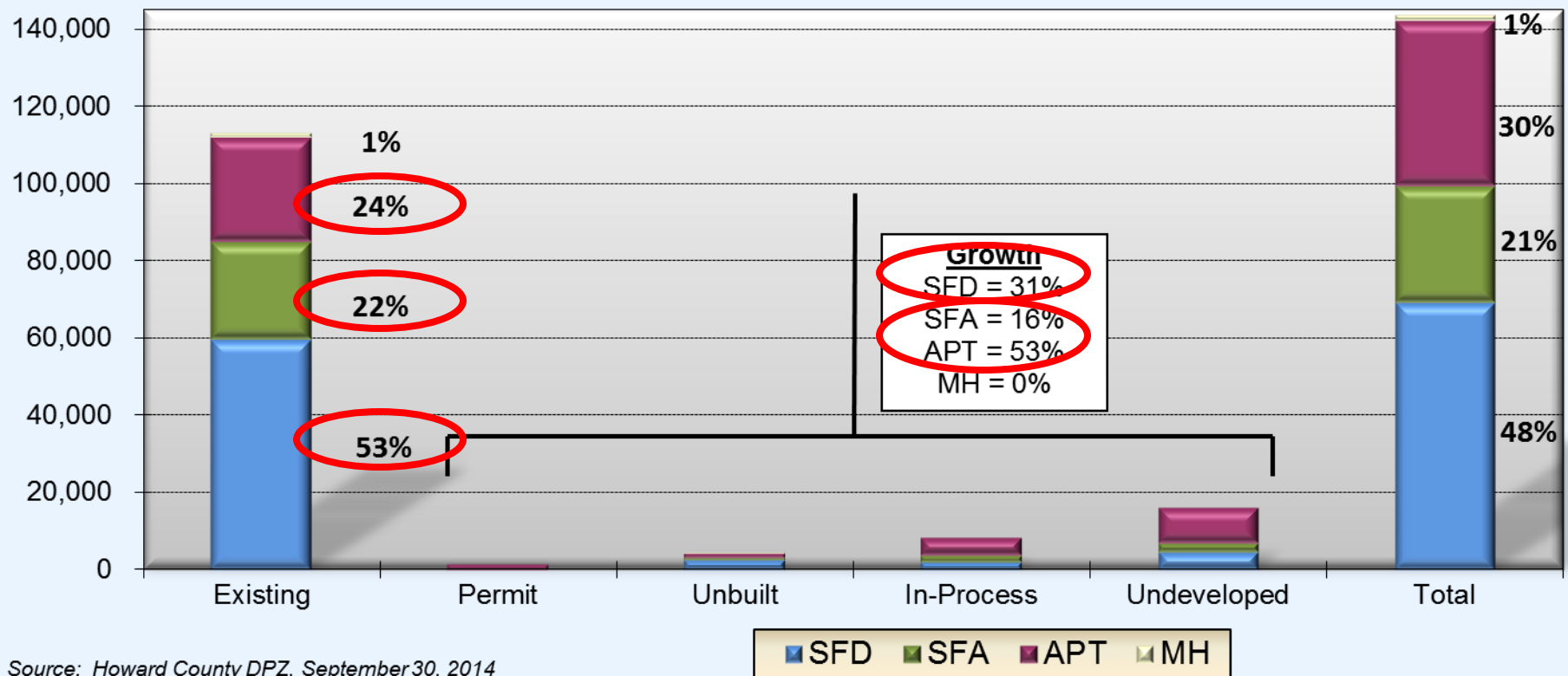


Residential Units by Development Stage in Howard County September 30, 2014



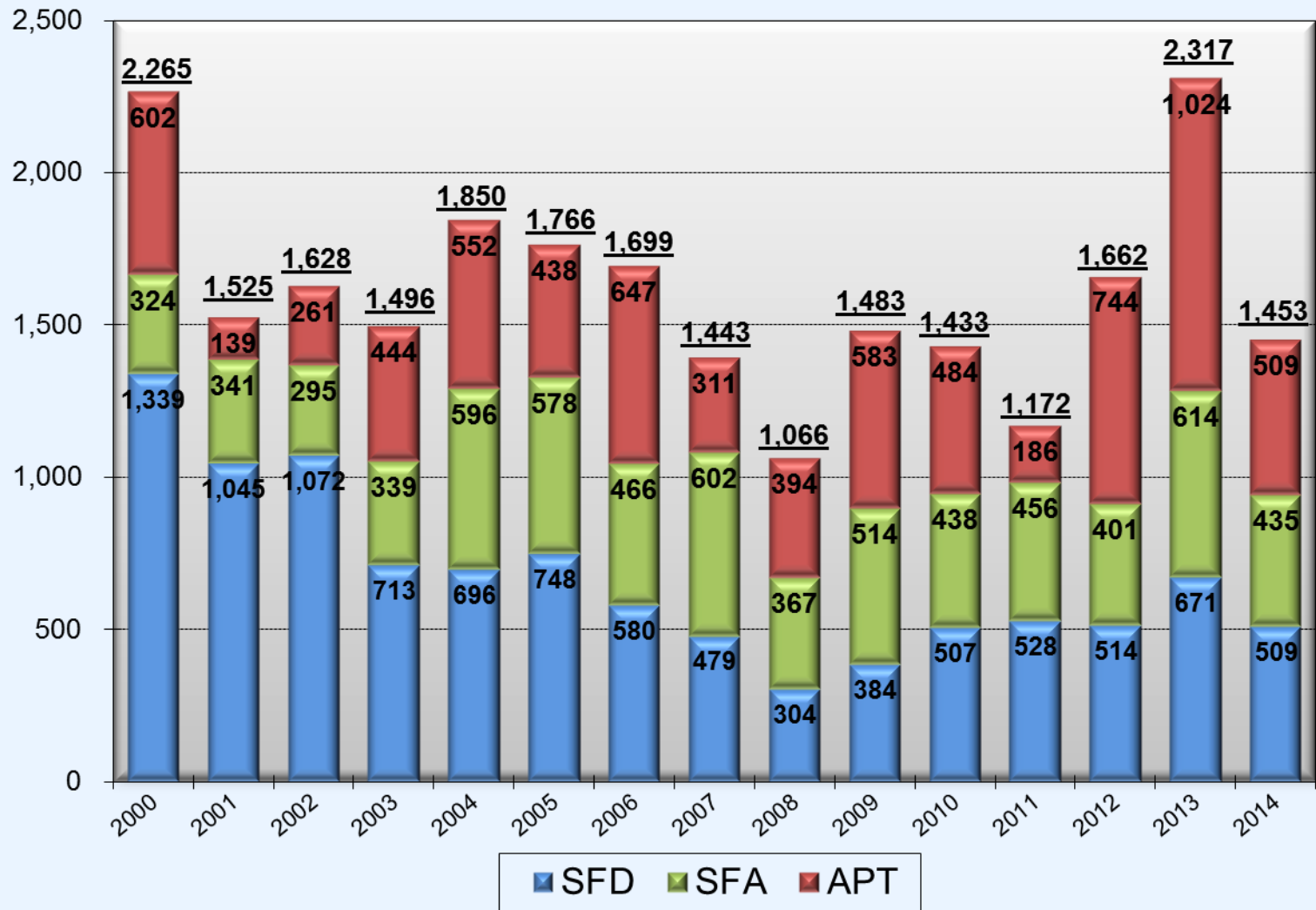
Source: Howard County DPZ, September 30, 2014

Residential Units by Development Stage in Howard County September 30, 2014



Source: Howard County DPZ, September 30, 2014

Total Residential Building Permits Issued 2000 to 2014 Howard County



Source: Howard County Department of Inspections, Licenses and Permits

Higher Densities & Mixed Use



Downtown Columbia

30 Year Plan Adopted Feb 1, 2010



The Evolution of Downtown Columbia

Today



Vision For The Future



Development Program:

Residential

5,500 units

Retail

1,250,00 sq ft

Office

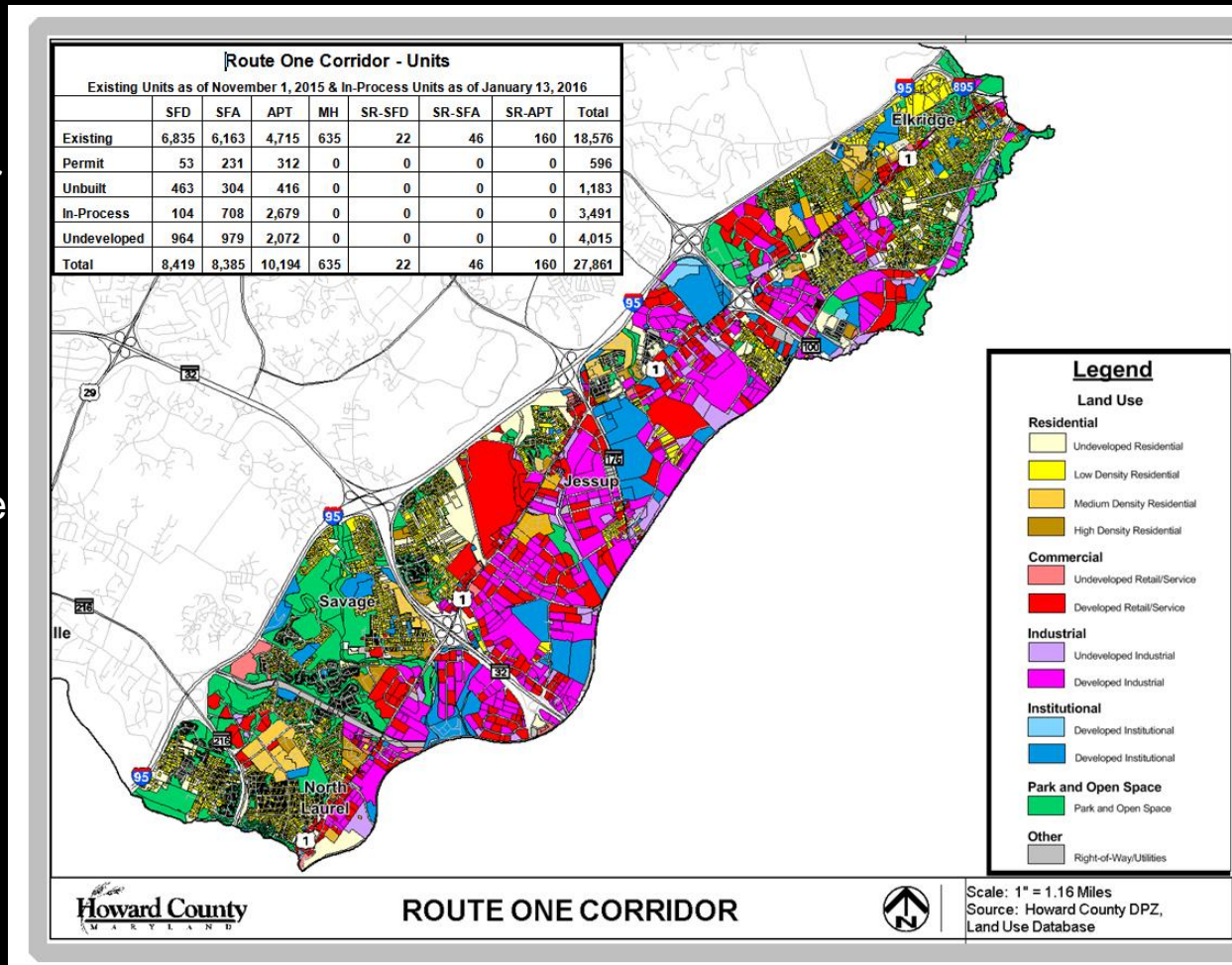
Hotel/Conference Center

4,300,000 sq ft

640 rooms

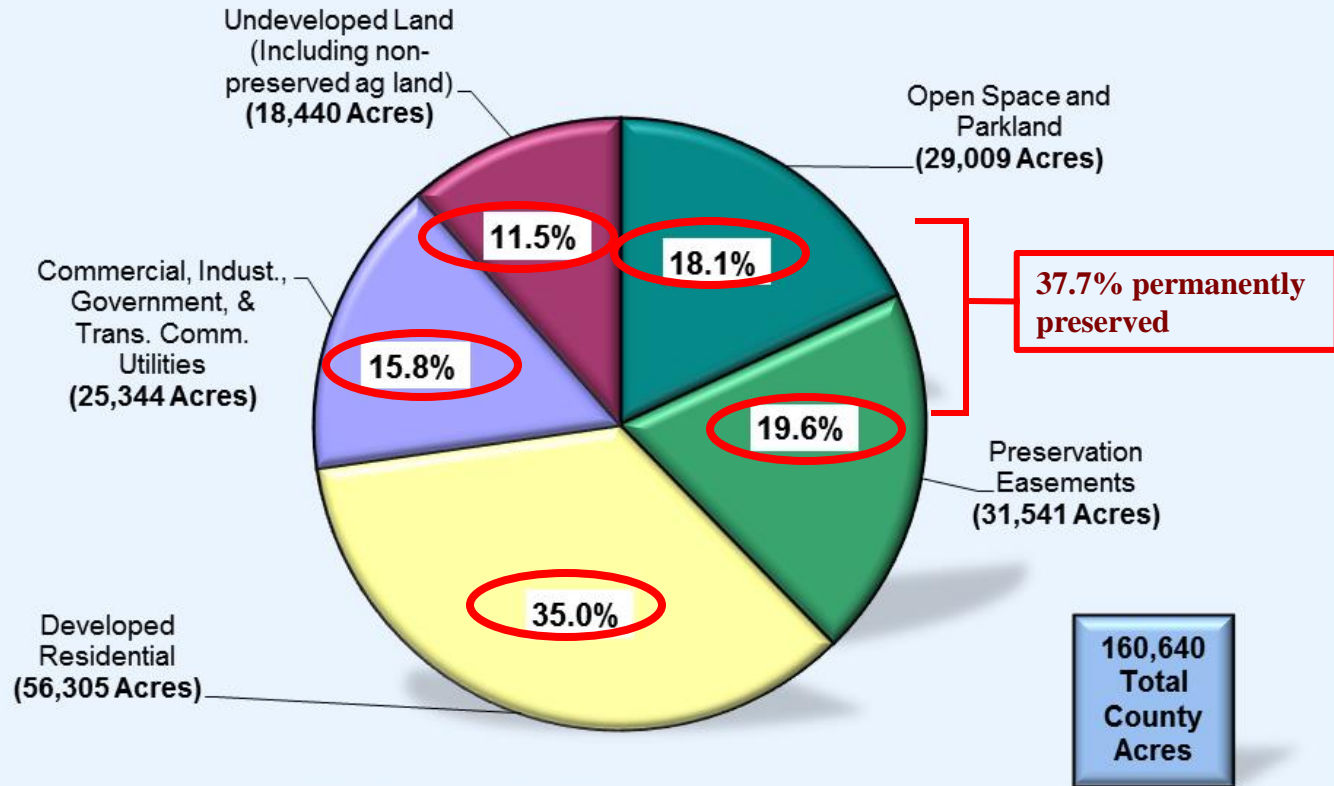
Route 1 Corridor - 3 Unique Districts

- Corridor Activity Center
 - ◆ Pedestrian oriented
 - ◆ 1st floor retail, office or residential above
- Transit Oriented Development
 - ◆ Near MARC stations
 - ◆ Multistory office, dense residential, some retail
- Corridor Employment
 - ◆ Office, flex, manufacturing
 - ◆ No auto or warehouse
 - ◆ Limited retail



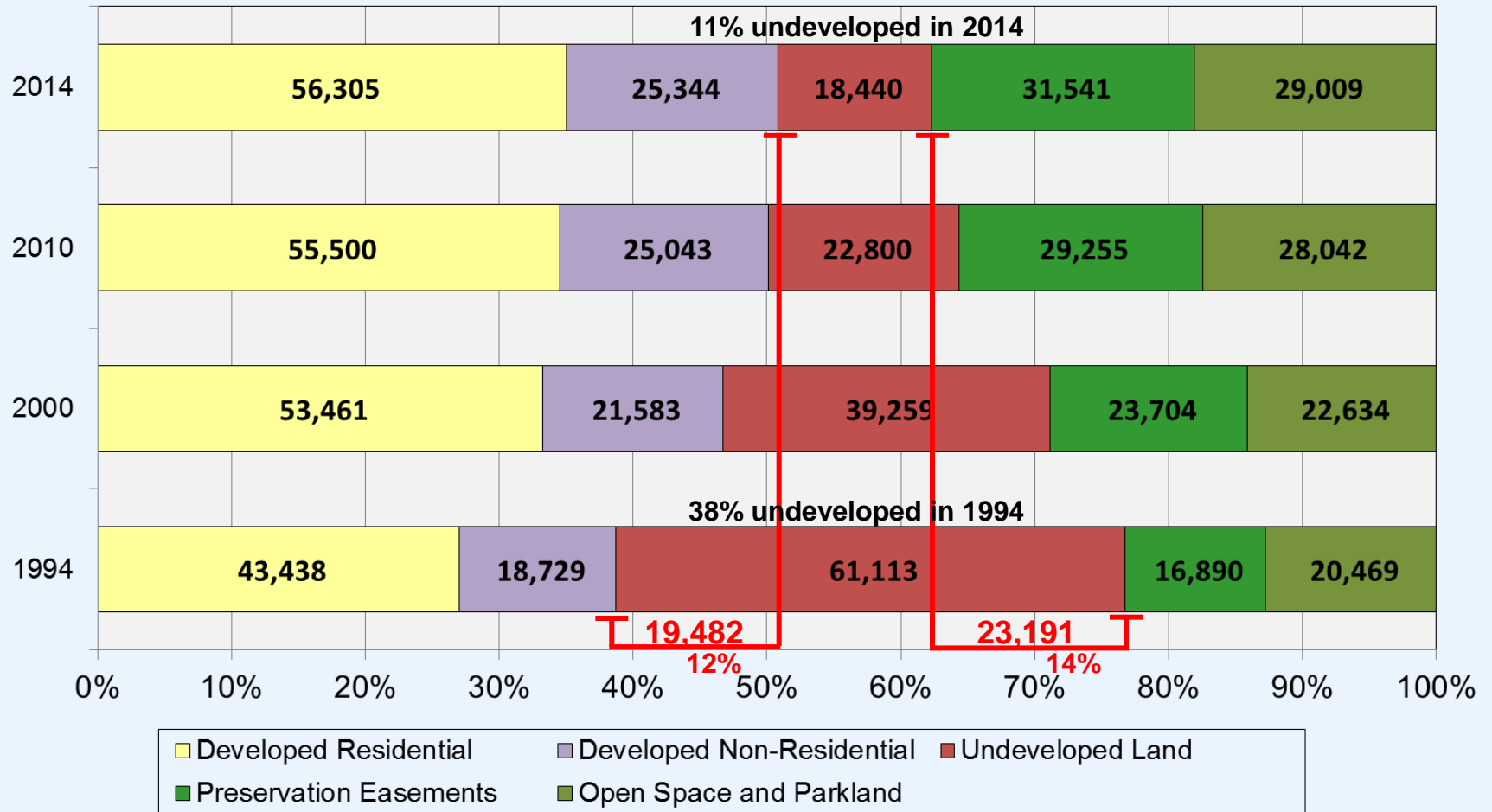
The 5,500 new housing units in DT Columbia and the estimated 9,500 new housing units in the Route 1 corridor are 50% of the total 30,300 new units projected in Howard County over the next few decades.

Howard County Land Use - September 30, 2014



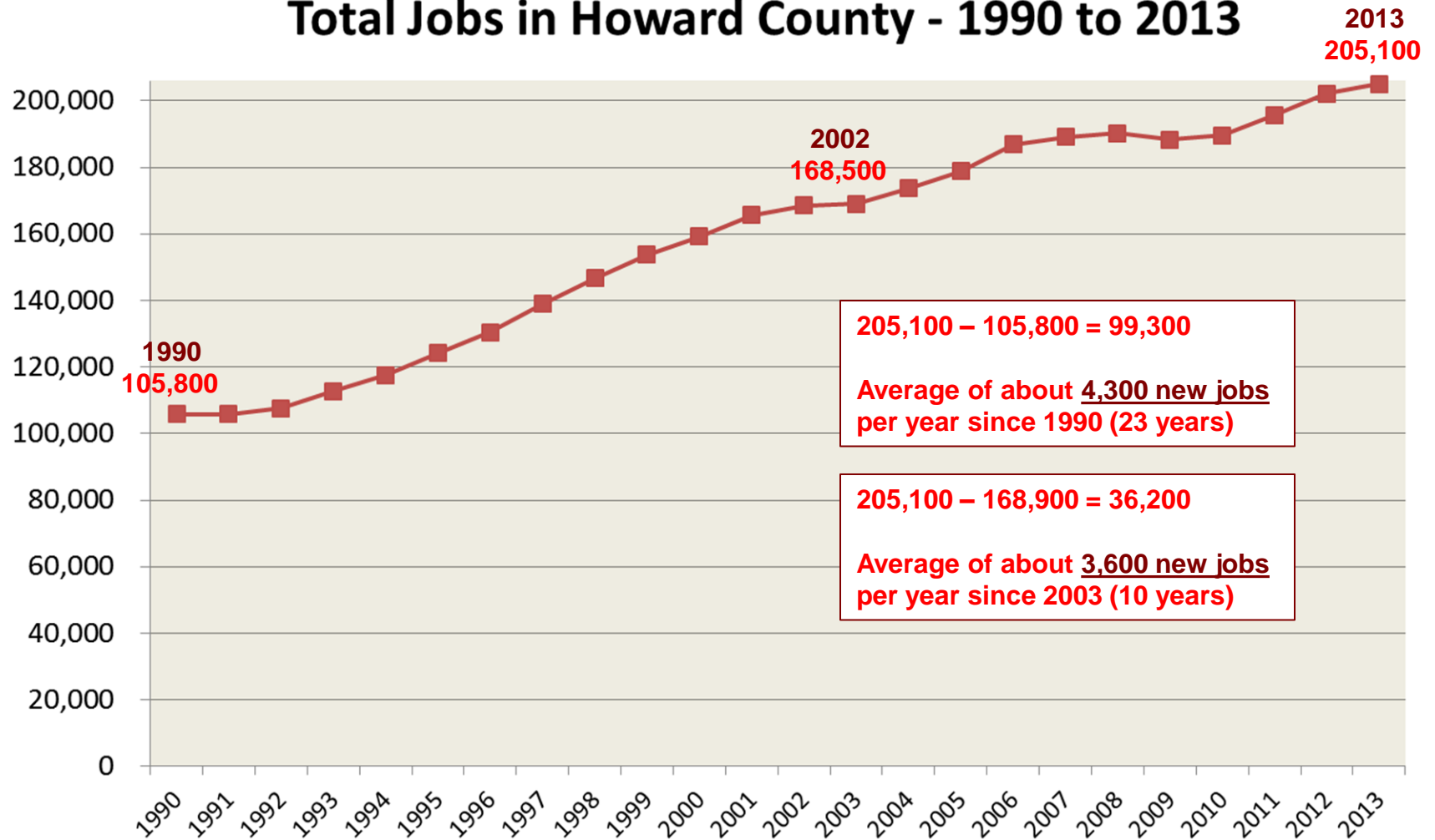
Source: Howard County DPZ, September 30, 2014

Howard County Land Use Acres, 1994 to 2014



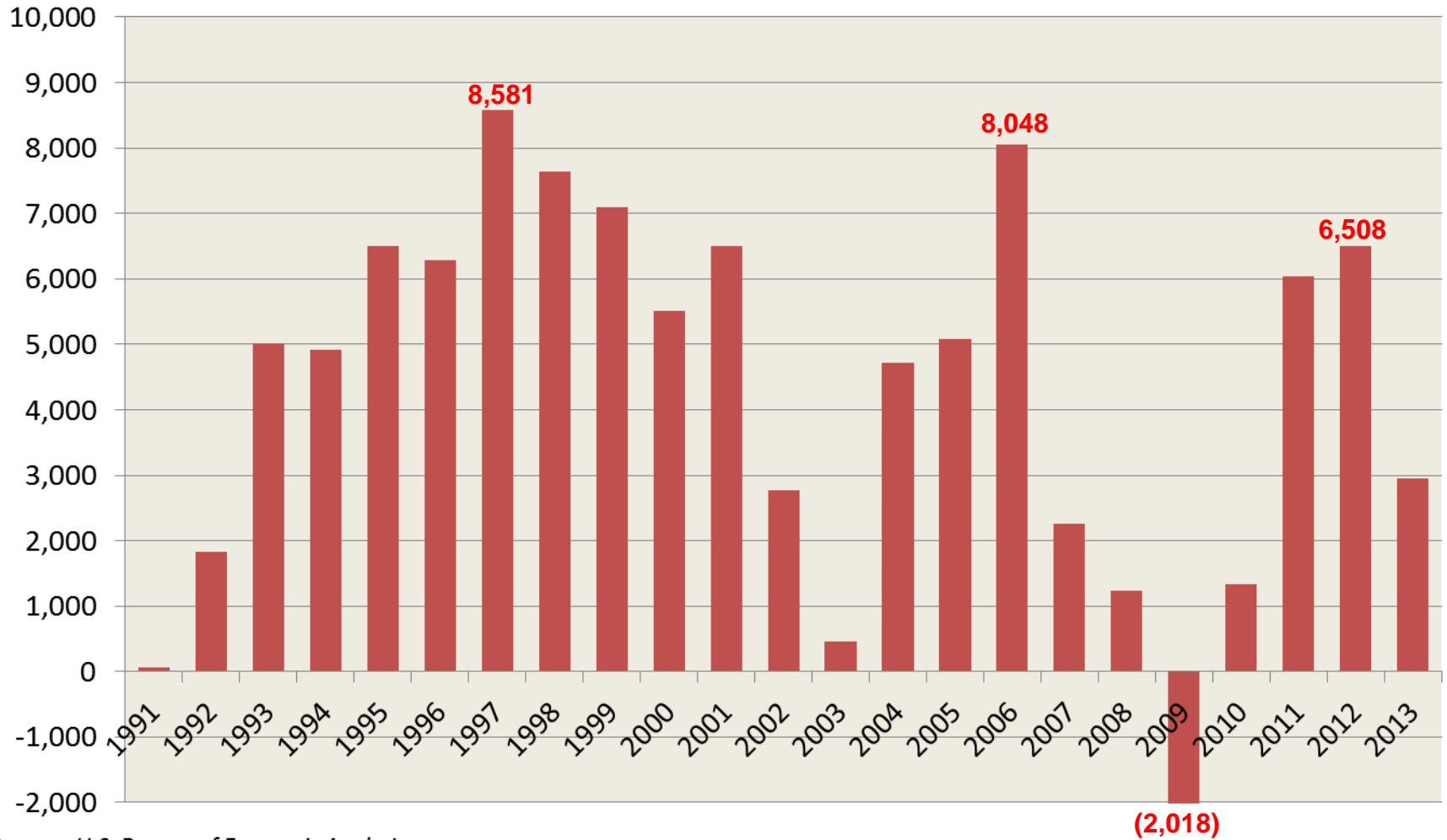
Source: Howard County DPZ

Total Jobs in Howard County - 1990 to 2013



Source: U.S. Bureau of Economic Analysis

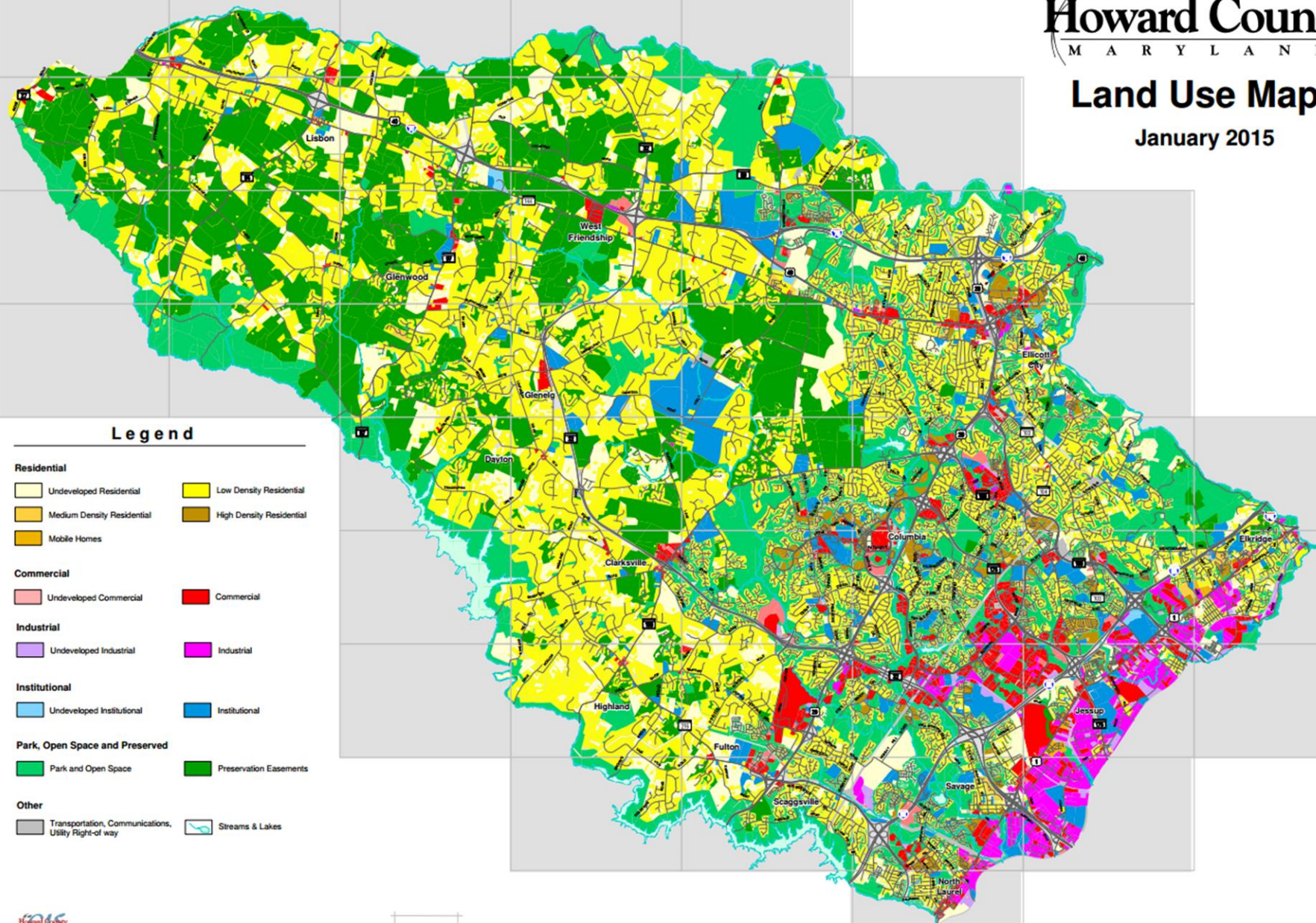
Job Growth in Howard County - 1990 to 2013



Source: U.S. Bureau of Economic Analysis

Land Use Map

January 2015



Legend

Residential

- | | | | |
|--|----------------------------|--|--------------------------|
| | Undeveloped Residential | | Low Density Residential |
| | Medium Density Residential | | High Density Residential |
| | Mobile Homes | | |

Commercial

- | | | | |
|--|------------------------|--|------------|
| | Undeveloped Commercial | | Commercial |
|--|------------------------|--|------------|

Industrial

- | | | | |
|--|------------------------|--|------------|
| | Undeveloped Industrial | | Industrial |
|--|------------------------|--|------------|

Institutional

- | | | | |
|--|---------------------------|--|---------------|
| | Undeveloped Institutional | | Institutional |
|--|---------------------------|--|---------------|

Park, Open Space and Preserved

- | | | | |
|--|---------------------|--|------------------------|
| | Park and Open Space | | Preservation Easements |
|--|---------------------|--|------------------------|

Other

- | | | | |
|--|--|--|-----------------|
| | Transportation, Communications, Utility Right-of way | | Streams & Lakes |
|--|--|--|-----------------|

Current Development



Residential Subdivisions

Table 12
Number of Potential Units from Subdivision Plans in Process, 12/31/15
(With comparisons to Countywide total as of 12/31/14)

Planning Area	Single Family Detached	Single Family Attached	Mobile Apartments	Homes	TOTAL UNITS
Downtown Columbia	0	0	2,300	0	2,300
All Other Columbia	283	126	0	0	409
Elkridge	85	636	2,187	0	2,908
Ellicott City	535	747	482	0	1,764
Rural West	249	0	0	0	249
Southeast	312	172	1,127	0	1,611
TOTAL	1,464	1,681	6,096	0	9,241
PERCENT	16%	18%	66%	0%	100%
As of 12/31/14	1,679	1,367	6,293	0	9,339

Residential Subdivisions

Table 16
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 12/31/15

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	FDP-DC-CRSCNT-1	Downtown Columbia - Crescent	APT	2,300	2,300
All Other Columbia	S-15-007 SP-15-006	Simpson Oaks Enclave at Tierney Farm - Phase 2 & 3	SFD, SFA - 19 MIHU SFD	184 100	284
Elkridge	S-14-001, F-13-108, F-14-046 S-06-018 S-14-002, P-15-003 S-06-010, F-15-062 S-15-002 S-10-002 P-15-002	Oxford Square - Remaining Phases The Overlook at Blue Stream - Remaining Phases The Park at Locust Thicket Howard Square - Remaining Phases Elkridge Crossing - Remaining Phases Morris Place - Remaining Phase Shipley's Grant	APT - 151 MIHU APT - 98 MIHU APT - 50 MIHU SFA, APT - 62 MIHU SFA SFA - 15 MIHU SFA - 7 MIHU	1,005 668 387 366 142 79 65	2,712
Ellicott City	S-86-013, PB 386 F-15-087, F-16-046, 061, SP-14-008 S-08-001 S-11-002 S-16-004 F-15-018, F-16-048 S-11-004 F-08-85 S-11-003	Turf Valley - Remaining Phases Westmount Turf Valley Clubhouse The Bluffs at Turf Valley Dorsey Overlook Long Gate Overlook Turf Valley - Pod E Villages at Turf Valley - Phase 3 Turf Valley Clubhouse 2	SFA, APT SFD SFD, SFA, APT APT SFD, SFA SFA SFD, SFA SFA SFD, SFA	520 325 128 114 83 79 74 59 53	1,435
Southeast	S-10-004 F-16-010 F-16-021, SP-15-014	Laurel Park Station - All Phases The Vine - Buch Apartments Maple Lawn South, Phases 1 & 2	APT, SFA - 150 MIHU APT - 43 MIHU SFD	1,000 283 175	1,458
TOTAL					8,189

Commercial Site Plans

Table 56
Building Square Feet in In-Process Site Development Plans, 12/31/15
with Comparisons to Countywide In-Process on 12/31/14

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	35,903	13,027	0	0	0	48,930
All Other Columbia	73,783	43,654	0	24,000	0	141,437
Elkridge	18,387	16,741	0	135,342	5,165	175,635
Ellicott City	2,400	0	0	0	0	2,400
Rural West	0	15,981	0	0	0	15,981
Southeast	0	104,412	30,017	6,392	4,000	144,821
TOTAL	130,473	193,815	30,017	165,734	9,165	529,204
PERCENT	24.7%	36.6%	5.7%	31.3%	1.7%	100.0%
12/31/2014	188,327	109,510	151,059	222,349	11,210	682,455

Commercial Site Plans

Table 57
Projects With More Than 10,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/15

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-16-018	Merriweather Post Pavillion and Park	Office/Commercial	48,930	48,930
Columbia	SDP-15-078	Grace Drive	Office/Restaurant	45,915	130,248
	SDP-16-021	Antwerpen Properties - Ten Oaks	Retail	24,671	
	SDP-12-006	Dar-Al-Taqwa	Temple Expansion	24,000	
	SDP-15-002	Clarksville Commons	Shopping Center	21,710	
	SDP-15-004	Coleman Fiat	Auto Sales/Service	13,952	
Elkridge	SDP-16-013	Elementary School #42	New School	116,633	158,623
	SDP-13-021	Mayfield Logistics Facility	Government Facility	18,709	
	SDP-15-069	CVS	Pharmacy	13,281	
	SDP-16-017	Howard Square	Retail Site	10,000	
Rural West	SDP-14-059	Donaldson Funeral Home	Funeral Home	15,981	15,981
Southeast	SDP-16-011	Maple Lawn Business District	Office Building	104,412	134,429
	SDP-15-005	Napa Washington	Warehouse	30,017	
TOTAL					329,588

LIFE IS
CHANGE.
Growth is
optional.
Choose wisely.